

Asset Allocation

305 306 308 310
Investor Profile Advanced Asset Allocation Portfolio Construction Portfolio Monitor

Investment Basics

Investment Principles

Stocks

Mutual Funds

Money Markets

Investment Process

Asset Allocations

Goal Planning/Calculations

Retirement

House / mortgage

College

One-Click Diversification

Security Screening

Investment FAQs

Investment Glossary

Tax Savings Investments

Premier Services

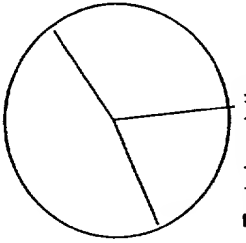
Product and Service

DB Research

1

Defensive

402



Text description

Click in an asset class to obtain historical information (other classes will go dark or fade)?

% Cash Equivalents

% Fixed Income

% Equity

Ytd

3mo

1yr

3yr

406

408

410

One-Click Diversification

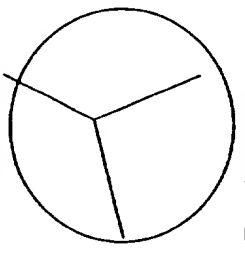
Save as Watch Portfolio

412

2

Defensive / Conservative

404



Text description

5

Aggressive

One-Click Diversification

Save as Watch Portfolio

300

FIG. 4

Portfolio Construction Tool

305

306

308

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Investor Profile Advanced Asset Allocation Portfolio Construction Portfolio Monitor

Portfolio Construction Tool

The following tool will enable you to construct a new portfolio or to modify your existing MaxBlue portfolio based upon an Asset Allocation benchmark of your choice, a goal(s) based investment target, or self-directed.

Please make a selection to fill in the pie chart (or other information) on the left side of the screen. Then choose what type of portfolio you would like to construct or modify, in pie-chart form, on the right side of the screen.

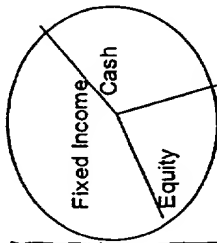
Portfolio Construction / Modification for John Doe

Asset Allocation Benchmark, 500 Your Portfolio (Acc # / file name) 502

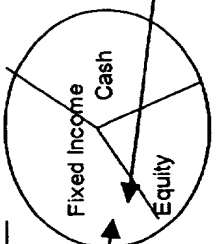
Goal(s) Based, or Self Directed ☐ One-Click Diversification

(click and choose one) Portfolio Description / file name

R\$ Amount to Invest / or Invested



Click in an Asset Class to begin



Click on an asset class if you would like to change allocations

% Cash Equivalents
% Fixed Income
% Equity
100% must equal 100% to view returns

The figures below will change as you add securities to your portfolio

Diff
% Cash Equivalents
% Fixed Income
% Equity

Returns vs. Indx Vol. Hi Lo

Ytd 3mo 1yr 3yr
From To

Returns vs. Indx Vol. Hi Lo

Ytd 3mo 1yr 3yr
From To

FIG. 5

Manage [and Monitor] Portfolio 305

Investor Profile Advanced Asset Allocation Portfolio Construction Portfolio Monitor

Manage Portfolio

The following tool will enable you to monitor and manage each of your MaxBlue portfolios to the appropriate Asset Allocation benchmark or Goal which you may have used to construct the portfolio.

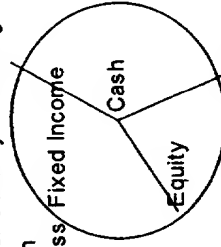
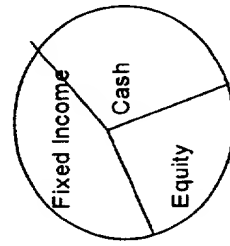
Please select the portfolio which you would like to monitor / manage and view on the right side of the screen.

Manage Portfolio

Asset Allocation Benchmark or Goal Portfolio (click and choose one) 602

Your Portfolio (Acc # / file#) (click and choose one) 604

Return to Portfolio Construction or Security Screening / Selection



The figures below will change (but may be unconfirmed) as you change your portfolio.

% Cash Equivalents	% Fixed Income	% Equity	% Cash Equivalents	% Fixed Income	% Equity	Diff
608	608	608	608	608	608	
Ytd	3mo	1yr	Ytd	3mo	1yr	
610	610	610	610	610	610	
From Inceptn	From Inceptn	From Inceptn	From Inceptn	From Inceptn	From Inceptn	
From To	From To	From To	From To	From To	From To	

Fig. 6

300